foundever™

Assessment Center

Coach Selection Process for the EnFin Account

Credit Operations

Author: Marcela Solorzano Cambronero

Version: 1.0

Contents

Coach Selection Process for the EnFin Account.....1

Credit Operations.....1

Introduction.....3
Instructions.....4
Business Context.....5
Case Study Scenario.....6
Score Card KPIs – Credit Operations.....8

Introduction

Welcome to the Coach Selection Process for the EnFin Account!

We are excited that you have accepted the invitation to participate in this Assessment Center, which represents the final stage of the Selection Process.

Reaching this phase is a significant achievement, and it reflects the potential, experience, and qualities you have demonstrated throughout the earlier stages of the process. We appreciate the time, effort, and commitment you have invested so far, and we are excited to learn even more about you during this final step.

The Assessment Center has been carefully designed not only to evaluate your skills, competencies, and overall suitability for the role, but also to give us a deeper understanding of who you are as a professional, a leader, and a collaborator. We encourage you to approach this experience with confidence, authenticity, and openness, as we are interested not only in what you know, but also in how you think, interact, and contribute to a team environment.

Best wishes and good luck!

Instructions

Presentation Guidelines

- **This is an individual exercise:** Your presentation should reflect your own analysis, strategic thinking, and leadership approach.
- **Presentation time:** You will have 20 minutes to present.
- **Q&A session:** A 10-minute Q&A will follow your presentation to clarify your ideas and explore your approach further.
- **Total interview time:** The full interview will last 30 minutes.
- **Purpose:** Use this opportunity to showcase your expertise, relevant experience, and the value you would bring as a Coach for the EnFin account.
- **Be concise and structured:** Focus on clarity, logical flow, and actionable insights. Avoid lengthy paragraphs.
- **Develop an action plan:** Address the challenges outlined in the case with practical, results-driven solutions.
- Familiarize yourself with EnFin's background, values, and operational context to ensure your recommendations are aligned.

Materials

- Presentation format: https://everconnect.foundever.com/everconnect/Article/Article/25950341
- Use the template as a guide: It is designed to help you organize your ideas clearly and ensure consistency across participants. You are welcome to customize it with your own content, examples, and insights relevant to the interview process. If you prefer, you may also use additional materials, keeping the presentation time in mind.
- Be ready to discuss your plan in depth: You may be asked to explain or expand on any part of your presentation, so make sure you fully understand and can support your recommendations.
- Use visual aids when helpful: Bullet points, tables, or other visuals may be included to improve clarity and strengthen the impact of your presentation.

Technical Tips

1. Kindly make sure your camera is activated and working correctly.
2. Please join the session a few minutes early to test your audio, video, and internet connection.
3. Ensure your presentation file is ready and easily accessible.
4. Have a backup ready in case of any technical glitches (e.g., PDF version or emailed copy).
5. Use a quiet, well-lit space to minimize distractions and allow clear communication.

Post-Presentation Process

- We anticipate having the results finalized and shared with you by **the end of day Tuesday September 1st,** 2026. The official communication will be share via email and will include the next steps and the anticipated start date if selected.
- After the interview process concludes, we will schedule follow-up feedback sessions.
- These sessions are designed to provide detailed insights and constructive comments regarding your performance and overall experience in the process.

- Feedback will be provided regardless of the outcome, as we believe these supports continued professional growth.

Business Context

EnFin is a residential solar financing company and a wholly owned subsidiary of Qcells, a major solar panel manufacturer. Which is the clean energy division of the major South Korean conglomerate, the Hanwha Group.

EnFin Credit Operations is a campaign that launched in Foundever Costa Rica in January 2024 and has continued to evolve within a highly dynamic and fast-paced operational environment. The campaign is characterized by frequent updates to processes, policies, and systems, requiring employees and leaders alike to demonstrate a high level of adaptability, resilience, and proactive communication to succeed.

Credit Operations supports Business-to-Customer/Homeowner interactions across a variety of workflows in both Voice and Backoffice functions. These include, but are not limited to, Video Welcome Calls, Complaints, Enhanced M2, AWS Calls, Titles Review, ID Review, Email and others. Given the diversity and complexity of these workflows, maintaining consistency in service delivery, compliance, and performance is essential. Recent KPI trends and client feedback have highlighted some variability in performance across both agents and Team Leads. This suggests opportunities to strengthen coaching effectiveness, improve operational consistency, and reinforce accountability at all levels of the operation.

The campaign also operates under a VCS-based compensation structure, which rewards agents who achieve performance targets in key areas such as Quality Assurance, Average Handle Time, and Perfect Attendance. As a result, performance management and coaching play a critical role not only in driving business outcomes, but also in supporting employee motivation and engagement.

As a fully onsite operation, the company places strong expectations on Team Leads to maintain a visible presence on the floor, closely monitor team performance, promote accountability, and cultivate a positive, high-performance culture. In this environment, effective leadership is essential to ensuring operational excellence, employee development, and alignment with client expectations

Performance Goals:

- ✓ **Quality:** 92
- ✓ **AHT:** 470 seconds
- ✓ **FCR:** 75%
- ✓ **Attendance:** 98%
- ✓ **DAs:** 0

Team's Performance:

Agent	Tenure	QA Score	AHT (sec)	FCR	Attendance %	Absences	DAs	Cases Handled	Login Hours
Adrian.Guerrero	1-3 years	100	440	77%	98%	0	0	420	160
Andres.Cespedes	91-180 day	85	510	85%	95%	1	0	380	158
Daniel.Araya	181-364 days	78	600	78%	90%	2	1	350	155
Daniela.Chaves	1-3 years	95	420	80%	99%	0	0	450	162
Diego.Navarro	1-3 years	88	480	85%	95%	1	1	498	159
Fabian.Campos	181-364 days	80	513	84%	92%	2	2	360	157
Kevin.Mora	1-3 years	94	495	80%	98%	0	0	433	157
Luciana.Fallas	91-180 day	93	443	78%	96%	1	1	423	165
Melissa.Ortiz	1-3 years	91	545	74%	99%	0	0	493	152
Natalia.Cordero	181-364 days	94	515	92%	100%	0	0	443	160
Nicolas.Brenes	1-3 years	100	529	88%	97%	0	0	489	178
Paola.Segura	1-3 years	96	562	82%	98%	0	0	512	177
Valeria.Monge	181-364 days	97	435	72%	100%	0	1	482	180

Case Study Scenario

You will be leading a team of **13 agents** across mixed schedules, supported by a **Coach Apprentice (SME)** who assists both the Coach and the agents, particularly during your days off. You have been asked to present a **turnaround action plan** based on the raw data example from the previously shared **Excel Assessment**. Over the past **three months**, your team has experienced the following challenges:

1. Low Team Performance, Limited Accountability, and Reduced Onsite Motivation

The team is currently facing challenges related to **inconsistent performance results, limited ownership of responsibilities, and reduced employee motivation** within the onsite environment. These factors may be contributing to gaps in KPI achievement, inconsistent process adherence, and lower overall engagement.

Current indicators include:

- Declining **QA scores**

- Rising **Average Handle Time (AHT)**
- High volume of feedback related to process adherence and communication gaps / low English proficiency
- Increased **client escalations**, particularly related to:
    - Process Adherence
    - Communication Issues
    - Use of Script
    - Internal/External Notation Failures
- Severity levels range from Medium to Highest, with agents receiving repeated high-severity feedback
- Positive feedback exists, but it is inconsistent across agents.
- Status categories (Done, To Do, In Progress) reflect backlogs and follow-up gaps

Candidate Questions (3 slides/pages)

1. What is your action plan to enhance **QA performance**, reduce **Average Handle Time**, and improve **First Call Resolution**?
2. What initiatives/ideas would you implement to improve **process adherence**, strengthen the **client's trust**, and support **business growth**?
3. What do you consider the primary challenges of managing an **onsite team**, and how would you effectively address each one?

2. Constant Changes and Updates

The operation is experiencing frequent changes across multiple channels at the same time, including updates to scripts, procedures, tools, policies, and AI-driven technologies. These may include new automation features, AI-assisted workflows, system enhancements, or digital tools intended to improve efficiency and customer experience. In many cases, these changes are introduced without sufficient time for full understanding, reinforcement, or practice, creating challenges for both SMEs and agents.

As Team Lead, you may struggle to absorb, interpret, and cascade updates clearly and promptly, which can create misalignment across the team. The introduction of new Foundever AI tools and technological changes may also increase uncertainty among employees, especially when expectations are not fully clear or when teams feel unprepared to use new systems effectively. This situation is contributing to resistance to change, confusion in execution, and a negative impact on agent morale, particularly when low-quality evaluations are linked to recently implemented updates or unfamiliar technologies.

Candidate Questions (1 slide/page)

1. How would you measure whether changes are being applied correctly?
2. How would you ensure the team adapts effectively to AI-driven technological advancements?
3. How would you address resistance to change and its impact on morale?

3. Time and Task Management

As Team Lead, you are expected to balance **strategic responsibilities**—such as performance reviews, refreshers, follow-ups, documentation, micro-training, and coaching sessions—with **daily operational demands**, including system issues, client escalations, shift coverage, and agent requests.

This constant balancing act can lead to a reactive **"firefighting" mode**, where multiple priorities compete for attention. As a result, deadlines may be missed, efforts may be duplicated, and the overall impact of leadership actions may be reduced.

Candidate Questions *(1 slide/page)*

1. How would you prioritize your time between **agent requests, performance follow-ups, and administrative tasks** to ensure none are neglected?
2. Provide a practical example of how you would structure your **day or week**.

Score Card KPIs – Credit Operations

	KPI	EnFin Goal	Weight (Should add up to 100% for all KPIs)	iCoach Internal Thresholds	KPI Metric Unit	Client Required	Calculation	KPI Description
1	Quality Calls	>= 92	40.00%	>=92 90- 91.99 80 - 89.99 <80	total	Yes	QA Score: the total points earned by summing an agent's scores across all evaluation criteria on the form.	A composite score derived from evaluating interactions against predefined quality criteria (e.g., compliance, accuracy). Ensures adherence to process standards, regulatory requirements, and service consistency.
2	AHT Calls	<= 470	30.00%	<=470 500-471 540-500 >541	seconds	Yes	(Total Voice talk + hold + ACW time) / voice contacts	The average duration of a voice interaction, including talk time, hold time, and after-call work. Assesses efficiency of voice channels and helps balance speed with quality.
3	Attendance	<= 98%	10.00%	<=99.91% 98% - 99.9% 97%-97.99 <96.99%	seconds	No	Attendance % = (Actual Min Worked ÷ Scheduled Min) × 100	Attendance Percentage measures the proportion of scheduled work time that an agent is actually present and available to handle customer interactions or assigned tasks. Assesses workforce health and wellness, highlights productivity impact, and evaluates effectiveness of absence-management programs.
4	First Call Resolution	>75%	20.00%	>75% 70%- 74.99% 65%- 69.99%	total	Yes	(Non repeat calls in 24hrs/ total calls)*100%	Measures the percentage of customer issues resolved during the very first interaction, without requiring follow-up or escalation. It is one of the most important indicators of support efficiency and customer satisfaction. Gauges overall customer sentiment and identifies areas for service improvement.

				<64.99%				